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AUTHOR	Walter, Therese T.
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ABSTRACT

Section 2 of the 1980 version of Pennsylvania's Long Range Plan for School Improvement (LRPSI) might be characterized as a "catch-all." The technical assistant faces the task of making connections both within this section, entitled "Management Planning," and among the remaining four sections of LRPSI. The following directives for technical assistants may be derived from Section 2's major currents or themes: (1) communicate to district personnel the importance of management for the overall instructional program, (2) be aware of possible discrepancies between the planning and management skill levels assumed by LRPSI and the actual skill levels of district personnel; (3) help implement the degree and quality of the LRPSI process the district chooses according to its specific needs; (4) develop skills in managing declining resources; (5) help the district plan so that implementation can continue beyond LRPSI's 5-year term; (6) help the district fit existing skill levels in the technical assistance system to its own needs. Technical assistance agencies, LRPSI school districts, and Pennsylvania Department of Education planners must all work together in good faith on the management planning emphases contained in SEction 2 if LRPSI is to be successful. (JBM)

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TECHNICAL ASSISTANCE

Long Range Plan for School Improvement

Therese T. Walter
Allegheny Intermediate Unit #3

I. Statement of Issue

The 1980 version of Pennsylvania's Long Range Plan for School Improvement contains five sections. This paper deals with Section 2, Management Planning. The major characteristics which must be underscored at the outset are:

1. Relatively little experience presently exists on the relationship of the Technical Assistant to Section 2; and
2. School districts seem to be comfortable with completing Section 2 since it very closely resembles earlier formats for Long Range Planning.

Earlier versions of the Long Range Planning document contained 13 separate sections. In an effort to consolidate the data submitted by school districts, the Pennsylvania Department of Education revised Long Range Plan format in 1980. A number of sections (i.e., budget enrollment and population trends, staffing, etc.) which were historically separate have veen placed in Section 2.

Section 2, as it is presently constituted, presents a challenge for the Technical Assistant. Since the section might be characterized as a "catch-all," the Technical Assistant is faced with assisting the district in making connections both within and beyond the section.

The Process Guides (published by the Pennsylvania Department of Education) stress a strong relationship between Section 2 and items like the following:

1. Organizing and managing curriculum and instruction;
2. Administering and supervising pupils, staff and budget;
3. Fostering positive staff-community, staff-staff, staff-pupil and staff-board relations;
4. Managing and coordinating state and federal programs; and,
5. Anticipating and responding to changes in the school district environment.

EA 016 622

The task of the Technical Assistant is to help a school district make connections between Section 2 and all the other sections of the LRPSI document. The connections, while discussed in the PDE Process Guides, are not obvious in the LRPSI reporting requirements. If a district chooses, Section 2 could be an isolated reporting section rather than a section which is connected to all of the variables in the school district program. The Technical Assistant is sometimes faced with the classic struggle between quality and reporting requirements.

II. Discussion

Discussions of LRPSI Section 2 with representatives from Higher Ed, Basic Ed and PDE underscored a number of themes. The major currents or themes from this work will provide the framework for discussion.

1. Section 2 of LRPSI, as presently constituted, seems to preserve the traditional separation of administration and curriculum.

   Although links between Section 2 and the other Sections of LRPSI are described in PDE's process manuals, the links are not apparent in the guidelines and instructions (which form the basis for reporting requirements). Unless the school district itself or the Technical Assistant helps relate management goals to program goals, the reporting requirements could sidestep any connections.

   Some people feel that districts should automatically make connections between program and items such as budget, personnel, enrollment, and allocation of resources. A review, however, of LRPSI Wave I Plans submitted to PDE indicates that a high number of districts did not have a close relationship between program (Section I) and the management resources to provide that program (Section II). It is, therefore, incumbent on the Technical Assistant to encourage district personnel to view the management section as the support for the driving force of districts--instructional program. The Technical Assistant must also remember that curriculum management is a relatively new term and most districts are only beginning to view program as an element of management.

2. Identified Skills Needed for a Quality LRPSI Process

   A number of discussions pointed to the fact that the LRPSI Process assumes certain levels of skills. Planning and management skills, as well as fairly high-level analysis skills, are assumed to be present in both district personnel as well as in the Technical Assistant. The facts, however, underscore the possibility that

2. Identified Skills Needed for a Quality LRPSI Process (cont'd)

the skills assumed in the LRPSI process do not exist at the same levels across the Commonwealth.

This skill issue is further exacerbated by various levels of expertise on local school boards. The plan must be approved by each district Board of Education and monitored by that Board. The level of understanding and insight into PDE's goals for LRPSI are not shared equally by boards across the state.

In a number of cases, the traditional division between administration and curriculum is perpetuated by the professional training of the people involved. Many administrators have not been trained to make connections between program and other purely "administrative" concerns. Another contributing factor to the division is the fact that many districts assign completion of different sections of LRPSI to different people. Experience indicates that building principals and building staff are most often involved in Section I while Section II is most often completed at the central administrative level. Unless planned interface occurs, the Sections could well be written in isolation, especially if the people completing the sections have not had professional training in both areas.

It is, therefore, incumbent on the Technical Assistant to first remember that LRPSI assumes a certain level of skill sophistication that may not exist in particular school districts. The Technical Assistant must, therefore, be sensitive to the level of expertise in the district and act simultaneously as a consultant, resource person, questioner and trainer. The Technical Assistant must also bear a strong sense of the total process and product even though the connections are not always apparent during the writing of the plan.

3. Quality and Credibility Cannot be Mandated

The Technical Assistant seems to be ever faced with the classic struggle between quality and compliance. In addition, the Technical Assistant is often hampered by credibility issues that exist among the parties involved in LRPSI. For example, some districts have a historical view of PDE that might be characterized as authoritarian and bureaucratic. Districts have submitted Long Range Plans in the past and have been faced with an interminable struggle to have the plan "approved." The current version of Long Range Plan for School Improvement does, in fact, eliminate the "approval" process for content. "Approval" presently exists for technical compliance and format only.

The vestiges of content approval, however, will die slowly. The credibility issue is one which really escapes oral and written discussion. The shift of the PDE to a technical assistance, supportive mode is one which only experience in practice will

support. Only experience with PDE's new stance will help change the attitudes that prevail in some places.

The issue of quality is one which squarely faces the Technical Assistant in each contact with a local district. This issue also surfaces at the PDE level. It must be remembered that the Long Range Plan for School Improvement is a process. Each district in the Commonwealth is free to implement the process to the degree and quality it chooses. The range of "quality" is diverse. The guideline for the Technical Assistant should probably be criterion-referenced. An important service is to assess where the district is now in order to judge how the plan is completed and what the plan hopes to accomplish.

As all Technical Assistants know, the range of skill and state of the art in Pennsylvania districts is broad. A planning process, such as LRPSI, can only hope to encourage a good-faith effort on the part of each district to come to grips with needs and consequent planning for action.

4. Good-Faith Planning Leads to Resource Questions

The entire process of specifying educational goals and programs, adopted by each district board of education, sometimes exacerbates the frustration level of managers. In a time of dwindling resources, the LRPSI process often emphasizes the shortfall and creates a management stance which finds itself cutting, rather than supporting and enhancing instructional programs.

In the process of the development of this paper, a number of pointed questions were raised in regard to resources. For example, if a need is identified in Section 1, such as Computer Literacy, will funds be made available to assist local districts to install and implement same? If the management section underscores the financial distress of a district, does planning help the district alleviate that condition?

Some say that the financial trends, accompanied in many districts by downward enrollment trends, are precisely the reason for the need for Long Range Planning. The Planning Process, in and of itself, is intended to facilitate the business of assessing realities and planning for the future. The Planning Process can, however, contribute to administrative schizophrenia. On the one hand, instructional programs for children are documented and enharced; on the other hand, financial constraints deter accomplishment of some of the programs identified as educational needs.

It is important that the Technical Assistant be aware of the struggle created by a good-faith planning process. Technical Assistants also need to develop skills in managing declining resources.

5. Five Years is Not Forever

Some resentment has been expressed on the part of local district personnel in regard to the fanfare attached by PDE to the LRPSI process. Many local districts feel that planning is part-and-parcel of everyday living in every school district. They feel that the "press" given to the LRPSI process sometimes sounds like no one in Pennsylvania has ever planned for education.

Other expressions have been voiced in regard to the five-year nature of the plan. The five years has been characterized as both too short a time and too long a time for planning. Some have expressed the feeling that the LRPSI cycle does not coincide with plans and activities already occurring in local districts. The observation that many districts' goals coincide with the beginning of the superintendent's term has also been made.

It is, therefore, important for the Technical Assistant to help the school district make the LRPSI plan fit as closely as possible the present state of affairs in the district. The LRPSI plan should, as far as possible, be consistent with the general goals and directions of the district. New and foreign goals and directions should not be the substance of LRPSI. The substance of LRPSI should rather be the goals and directions that the district had identified prior to PDE's new format and the district's wave for submitting the plan. Technical Assistance, and LRPSI, should allow the district to do what it was doing and go where it has determined to go before change in format.

Because of the questions regarding resource allocations for action plans a need for flexibility and adjustment was underscored. Modifications to action planning are acceptable at PDE and it is expected that plans will be modified to adjust for year-to-year changes. Since the current version of LRPSI assumes that the plan will be a working document which affects day-to-day activities in local school districts, the need for modification and flexibility is highlighted. The registration process, and the whole LRPSI process in general, is designed to create use of and commitment to a district plan. Since the reporting process calls for a midpoint process report and a final evaluation report, it is more important that the plan be a good working one rather than a good paper one.

6. Technical Assistants are Not Equal

A good deal of discussion, probably because of the composition of this working group, centered on the non-equality of persons assigned or invited to do technical assistance. According to PDE literature, technical assistance is intended to come from 3 sources: PDE, Higher Ed and Intermediate Units. Discussion recognized that all of these institutions and, in turn, all of the people employed by the institutions were at different levels of expertise and different levels of commitment in regard to LRPSI technical assistance.

Varying funding sources and reward systems also impinge on the role of technical assistance from different agencies. While theoretically sound, the variance of skill on the part of individuals and varying commitments on the part of institutions are realities that must be studied in this current LRPSI experience.

A companion issue in regard to institutions and individuals is the one related to long-vs. short-term partnerships or relationships. Some have said that the partnership concept implies variables such as mutual concern, responsibility and authority. Research underscores the fact that change generally does not come about because of an individual or individuals. Institutional commitment is necessary to bring about institutional change.

Another item in this discussion is that of role-overload. Most of the people identified as Technical Assistants already carry full-time responsibilities in their respective organizations. The role of Technical Assistant for LRPSI is, in many cases, an added burden which is admittedly worthwhile but also contributes to role overload. The role overload situation is also present in local districts. In all cases, individuals charged with completion of LRPSI are also charged with full-time responsibilities in the local district.

The only recommendation for the Technical Assistant is that of communication. Each individual involved in technical assistance must be committed to honest assessment of his/her own skills and honest commitment to sharing of information with all of the involved partners. For example, technical assistance from the Intermediate Unit can and does deliver certain expertise. The expertise from the Higher Ed communities can and should complement the IU services as well as help the district stretch into areas not provided by the Intermediate Unit or PDE.

The major point to be made in this area is that of cooperation, not only with the district receiving technical assistance but cooperation across the ranks of technical assistance people and institutions. All technical assistance personnel must remember that education in the Commonwealth of Pennsylvania needs all of the expertise that exists. No single organization has a pronounced corner on the expertise market. It is imperative that the Technical Assistant helps the school district to assess any and all of the expertise existing in the technical assistance system. The technical assistance family must be willing and knowledgeable enough to make expertise connections for the local district.

III. Recommendations

Suggestions for Technical Assistance Agencies:

1. Examine your commitment to Long Range Plan for School Improvement. Decide if your level of commitment has provided your assigned personnel both the time and the commensurate rewards for assisting local districts in the process.

2. Commit yourself to cross-institutional communication. Initiate action to create both formal and informal arenas for communication across the technical assistance network.

Recommendations for LRPSI School Districts:

1. Familiarize yourself with the LRPSI guidelines and instructions before requesting technical assistance.

2. Examine the available resources for technical assistance and make requests in a way that is non-duplicating. For example, if your IU offers planned course assistance, use it and seek Higher Ed assistance in an area of expertise that the IU does not offer.

3. Involve the technical assistance person on a long-term basis. One-shot assistance is likely to produce little or no result.

Recommendations for PDE Planners:

1. Consider ways in which the Guidelines and Instructions for LRPSI can help districts make closer connections across the sections.

2. Continue to deliver service in a technical assistance mode. Accomplishing this will shift the image of PDE.

3. Consider the action plans and directions of local districts when resources are allocated on a state-wide basis. This will help local districts see LRPSI as action assistance rather than paper planning.

IV. Summary

Section 2 is the "bottom line" of every long range plan. It is a challenge of the highest order to assist a district plan today for tomorrow. Some have said, however, that unless we do plan today, there will be no tomorrow.